

# Envirotrax® Online CSI Management System

## Quick Start Guide



Open a web browser and go to <https://www.envirotrax.com>. We recommend Windows Edge, or Google Chrome.

### Create an Account:

1. In the **CSI Management** menu, click on **Inspector Login**.
2. Create a "Master" account using your normal business email address for your User ID and a Password of your choice. The account should be created in the name of the owner/manager. Additional licensed employees should be entered as "sub-accounts" to the Master account in the **My Account > Sub Account Management** menu.

### Login to Your Account:

1. In the **CSI Management** menu, click on **Inspector Login**.
2. Enter your User ID and Password and click on the **Login** button.

### Select One of More Participating Water Suppliers:

1. Within your account, click on the **Water Supplier Management** button on the **Account Overview** page or click on **Water Supplier Management** in the menu system.
2. Click on the **Unselected** button to work in a participating water purveyor. You may select as many water purveyors as necessary. Click on the **Selected** button to remove your company from a water purveyor.

### Register your License(s):

1. Within your account, click on the **License & Insurance Management** button on the **Account Overview** page, or click on **License & Insurance Policies** in the **My Account** menu.
2. Submit one or more license numbers and the Envirotrax® staff will verify the license and validate the account. The name on the license must match the name on the account.

### Submit your Insurance if Required:

1. Within your account, click on the **License & Insurance Management** button on the **Account Overview** page, or click on **License & Insurance Policies** in the **My Account** menu.
2. Enter the insurance policy number and upload a Certificate of Insurance. The name on the insurance policy must match the name on the master account.

### Submit a CSI Certificate:

1. Within your account, click on **Submit CSI** in the **CSI Management** menu.
2. Search to see if a previous inspection for the address already exists within the system.
3. If an inspection already exists within the system, click on the **Submit CSI** button to the right of the address to submit a new inspection certificate for the existing address.
4. If the inspection is not found within the system, click on the **Start CSI Submission with a New Property Record** button to begin a new inspection for the property location.
5. Enter the inspection results and click on the Continue to the **Cross Connection Details** button.
  - a. If a previous inspection has been performed and the backflow assemblies have been associated with the property, click on the **Import Details** button.
  - b. If no backflow assemblies have been associated, click on the **Add Cross Connection Details** button and follow the prompts to add an assembly to the property location.
6. Click on the **Complete Submission** button at any time to submit the inspection certificate into the system.

### Checkout:

1. The inspection certificate will not appear in the system until you complete the payment process, even if the charge for the inspection is \$0.00. Within your account, click on the **Checkout** button on the **Account Overview** page or click on **Checkout** in the menu system.
2. Check off which inspections you wish to submit and click on the **Update** button.
3. Enter your payment information if necessary and click on the **Complete Submission** button.